Q5 INSTRUCTIONAL MANUAL

INTRODUCTION

The collection and validation of data is an integral part of any evaluation process. The Field Operations Bureau (FOB) and the largest 19 (except Los Angeles) counties within the framework of the County Performance Sample (CPS), have the responsibility to collect welfare case and client data and report the data to the appropriate Federal, state and county clients. In addition, ad hoc surveys are to be completed by FOB and CPS staff to collect specialized, focused, or more narrowly defined data. The Quality Control Information System (QCIS) is the software platform used to automate the data collection process.

Effective with the July 1997 sample month, a major revision to QCIS will be accomplished with the introduction of the **Q5**. The **Q5** transforms prior QCIS versions from a narrative data entry format to one in which nearly all data entry is codified. The coding of data allows for immediate data retrieval, management and reporting, consistent with many of the new federal welfare reform reporting requirements and state/county information needs.

The **Q5** is a table-driven, **"WINDOWS"** system that asks questions and requires data entry in broadly defined classes. This requires you to collect data for each question in a more defined scope. The manual that follows is designed to assist you, the **Q5** user, in understanding and navigating within the automated system.

NEW FEATURES

The Q5 version is **"WINDOWS"** based. That requires you to know “WINDOWS” functions contained in the Q5 such as:

MOUSE: The use of a mouse is recommended to maneuver in the Q5 software. In some cases if preferred, the mouse may be substituted by the arrow and function keys.

CLICKING: This term refers to activating one of the "click" buttons on the mouse. Throughout the Q5 user's manual, references will be made to clicking. When this is identified in the instructions, a single or double pressing of the mouse button will activate a part of the Q5 program.

CLASS: This term is now used to refer to broad categories of data needs. The Q5 class numbers generally correspond to the Food Stamp Quality Control (QC) element numbers.

ICONS: This term refers to several graphic squares shown at the top of each window screen. Each icon depicts a specific graphic such as a **"lighthouse"**, and an **"open folder"**, etc. Each icon allows you to activate a specific Q5 feature. The **"lighthouse"** icon, for example, can be activated with a click of the mouse and returns you to the assigned case screen. Only the icons that are in color (they will appear darker in black and white) are active in the screen. A list of the icons and their functions can be found in the glossary section of this manual.

In addition to using the icons, you will be able to access additional screens through the use of **MENU CHOICES** that appear above the graphic icons. The **MENU CHOICES** duplicate many of the icons and are there to give you keystroke alternatives.

CHAPTER 1

GETTING STARTED:

This manual is designed as a reference guide for the Q5 software. The manual is divided into several chapters that provide information to you on specific software actions. Depending on county or state preference, you have a couple of ways to get in or boot the Q5 software:

1. **"C" PROMPT:** After the computer completes the boot process, a **"C:\"** will appear. You will type "WIN**"** and press the <enter> key. The Q5/CDSS main logo screen will then appear. You will then follow the on screen directions to enter the Q5 program.
2. **DIRECT ACCESS:** In some computers, after the system boots up, the software is programmed to default to a **"WINDOWS SCREEN"**. Select the appropriate Q5 ICON from the WINDOWS master list to access the Q5/CDSS logo screen. At the CDSS/Q5 logo screen, you will follow the on-screen directions.

Upon accessing the CDSS Q5 logo screen, you are ready to proceed. In order to identify your Q5 program options refer to the appropriate chapter.

CASE SELECTION

1. BACKGROUND.

This chapter provides information on how to select case files. The Q5 process will allow you to access various individual screens in order to complete a case review.

***2. RETRIEVING A CASE FILE*.**

At the Q5/CDSS logo screen, you have five **MENU** selections that enable you to activate different segments of the Q5 program. The list of choices and a description of their function is as follows:

MENU CHOICES

CHOICE	**FUNCTION and DESCRIPTION**
FILE	• Open Worksheets allows you to access the case assignment list. • *Assign Worksheets is where you do actual case assignments.* • Run Consistency Edits allows you to access the "Run Edits" options needed to clear edits. • Reprint Last Edit Report allows you to send to the screen or to the printer the last edit report. • Review Federal IRS allows you to send to the screen or printer a Federal IRS printout • Send/Receive Data allows you to access the SAFE system • Review Message Log provides you with information regarding the status of cases sent and received via the SAFE system and thru diskettes. • Exit allows you to leave the Q5 program.
REPORT	• *Sample List with Review Status allows user's to send to the screen or printer a report showing the most current status for each sample month.*

CHOICE (continued)	FUNCTIONS and DESCRIPTIONS (continued)
REPORT (CONTINUED)	• Review by Sample allows you to send to the screen or printer a copy of the user's sample month assignment • Review by Status allows you to send to the screen print a copy of your sample month assignment or to the printer a copy of your case status. • *Review by Status Graph allows you to send to the screen or to the printer a copy of your case status in graph form.* • Communications History provides you with a complete history of each case • Worksheet All Section allows you to send to the screen or printer all sections of the Q5 worksheet. • Worksheet Facesheet allows you to send to the screen or the printer the FACESHEET section of the Q5 worksheet. • Worksheet Data allows you to the screen or printer the DATAENTRY section of the Q5. • Worksheet Comments allows you to send to the screen or printer any available comments used in the Q5 worksheet. • Food Stamps Budget Worksheet allows you to send to the screen or printer the Food Stamp budget worksheet.
LIST	• Profile Class List allows you to print a complete profile class list for any program. • Profile Class Item List allows you to print a complete profile class listing with the related items for

CHOICE (continued)	FUNCTIONS and DESCRIPTIONS (continued)
LIST (continued)	each in any program. • Profile Edit List allows you to print an edit list for each profile. • Master Class List with Profiles allows you to print a complete class list with the related profile for both TANF and FS programs. • Master Class/Item List w/Profiles allows you to print a complete class list with all related items and profiles for both TANF and FS programs • Required Item List provides you with a complete listing of required items in each class for all programs. • Office Hierarchy provides you with a listing of FOB offices • Analyst Listing provides you with a complete listing of all analyst in FOB.
UTILITY	• PreCompile must be done after loading an updated version of the Q5 program. • BackUp Data allows you to back up data. • Test BackUp Diskette(s) allows you to test blank diskettes for possible defects or virus infection. • Restore Data allows you to restore data that has been lost. • Rebuild Databases allows you to rebuild the Q5 database. • *Cleanup Temporary Files allows you to cleanup temporary Q5 files that are created as the system is used.*

CHOICE (continued)	**FUNCTIONS and DESCRIPTIONS (continued)**
UTILITY (continued)	• Password Maintenance allows you to install a password in the Q5 system. • *Add Worksheets allows you to add new case reviews to their sample month review* • Drop/Undrop Profiles allows you to drop or reestablish a previously dropped profile from a case (refer to chapter 9 for more details) • Correct TANF Supplemental - 2 parent Profiles allows you to correct a TANF characteristic only case reviews so that these correctly show the required classes. • Change Blank County to Alameda allows you to retrieve "lost" test cases. • Review Audit Log provides a complete history of each review
SETUP	• *Classes/Items is a for* ***SYSTEM MAINTENANCE UNIT USE ONLY****.* • *Profiles is for* ***SYSTEM MAINTENANCE UNIT USE ONLY*** • *Copy Tables To Diskette allows users to copy Q5 tables to a diskette* • *Copy Tables From Diskette allows users to copy Q5 tables from a diskette* • Make Profile allows you to create a new profile **(ALTHOUGH AVAILABLE YOU ARE ADVISED NOT TO USE THIS COMMAND)**

CHOICE (continued)	FUNCTIONS and DESCRIPTIONS (continued)
SETUP (continued)	• *Make Class allows you to create a new class* ***(ALTHOUGH AVAILABLE YOU ARE ADVISED NOT TO USE THIS COMMAND)*** • *Make Profile. List is for* ***SYSTEM MAINTENANCE UNIT USE ONLY*** • *Make Class. List is for* ***SYSTEM MAINTENANCE UNIT USE ONLY*** • *Rebuild Tables is for* ***SYSTEM MAINTENANCE UNIT USE ONLY*** • *Reset Item Classes is for* ***SYSTEM MAINTENANCE UNIT USE ONLY*** • *Clean Profile Table is for* ***SYSTEM MAINTENANCE UNIT USE ONLY*** • *Clean Code Table is for* ***SYSTEM MAINTENANCE UNIT USE ONLY***
DO MENU	• *Key Entry Skeleton Proof Sheet provides a report confirming the skeleton case assignment. This function is for* ***SACRAMENTO CPU USE ONLY*** • *List of Outstanding Cases by D.O allows users to send to the screen or printer a listing of outstanding cases* • Send All "B" Reviews allows you to send all "B" status review for a given sample month • *Edit All Reviews in a Sample Month allows users to run the edit consistency report on a sample month basis* • Load Sample file allows you to load the sample file. *This is for* ***SACRAMENTO CPU USE ONLY*** • Review Load Log allows you to send to the screen

CHOICE (continued)	FUNCTIONS and DESCRIPTIONS (continued)
DO MENU (continued)	or the printer a complete history all load actions done

- *Distribute Sample Via SAFE is for **SACRAMENTO CPU USE ONLY***
- *CPU Main Sample Reports provides listing to reports that are based on the prior "XTQC" system*
- *District Office Sample Reports provides a report showing the district office sampling*
- *Load CINTRAK File*
- *Create FNS Upload File – Actives is the operating command to send active Food Stamp cases to FCS(KCC). This function is for **SACRAMENTO CPU USE ONLY***
- *Create FNS Upload File – Negatives is the operating command to send negative(closed case) Food Stamp cases to FCS (KCC). This is for **SACRAMENTO CPU USE ONLY***
- *Create TANF Upload File is operating command to send TANF(CalWORKs) cases to ACF. This is for **SACRAMENTO CPU USE ONLY***
- *ISB Generate TABLE commands provides Q5 data to ISB (now Data Analysis Branch) for their reporting requirements*
- *ISB Print File Descriptions provides Q5 data to ISB (now Data Analysis Branch) for their reporting requirements*
- *ISB Create ISB*.FTM Files provides Q5 data to ISB (now Data Analysis Branch) for their reporting requirement*
- *Convert AFDC Data File for DHS converts Q5 data for use by Department of Health Services.*

CHOICE (continued)	FUNCTIONS and DESCRIPTIONS (continued)
DO MENU (continued))	*This is for* ***SACRAMENTO CPU USE ONLY***
FNS TABLE	• Disposition Report provides you with a disposition report • FNS Table 247.1 provides you with a report of the noted table • FNS Table 247.2 provides you with a report of the noted table • FNS Table 247.3 provides you with a report of the noted table • FNS Table 247.4 provides you with a report of the noted table • FNS Table 247.5 provides you with a report of the noted table • Run 247.1 thru 247.5 provides you with the option to obtain at one time all four table reports • Build FNS Database is command that needs to be run prior to generating any of the prior noted reports
AFDC TABLE	• *Disposition Report provides you with a disposition report* • *AFDC Table 1 – Stat Summary Report a report of the noted table* • *AFDC Table 2 – Errors by Type provides you with a report of the noted table* • *AFDC Table 3 – Errors by Element provides you with a report of the noted table* • *AFDC Table 3a - $ Errors by Type provides you with a report of the noted table*

CHOICE (continued)	***FUNCTIONS and DESCRIPTIONS (continued)***
AFDC TABLES (continued)	• *AFDC Table 4 – Profile by Sample provides you with a report of the noted table*
	• *Run Tables 1 thru 4 provides you with the option to obtain at one time all of the table reports*
	• *Build AFDC Database is command that needs to be run prior to generating any of the foregoing reports*
MISC	• *Rolling Error Rate Report allows you to send to the screen or the printer the noted report*
	• *OIB Table 1 (Agency/Client) allows you to sent to the screen or the printer the noted report*
	• *OIB Table 2 (Element) allows you to sent to the screen or the printer the noted report*
	• *AFDC Agency/Client $ Error allows you to sent to the screen or the printer the noted report*
	• *FS Agency/Client $ Error allows you to sent to the screen or the printer the noted report*
	• *Error Case Identifier List allows you to sent to the screen or the printer the noted report*
	• *Build FNS Database is command that needs to be run prior to generating any of the aforementioned reports*
	• *Build AFDC Database is command that needs to be run prior to generating any of the aforementioned reports*
	• *County Caseload Management Report allows you to send to the screen or the printer the noted report*
	• *Case Assignments by Analyst Report allows you to send to the screen or the printer the noted report*

CHOICE (continued)	***FUNCTIONS and DESCRIPTIONS (continued)***
MISC (continued)	• *Review Listing by Status allows you to send to the screen or the printer the noted report* • *Skeleton Master Listing Report allows you to send to the screen or the printer the noted report* • *Outstanding Cases by Analyst Report allows you to send to the screen or the printer the noted report* • *Outstanding Cases by Sample Month Report allows the user to send to the screen or the printer the noted report* • *Build Both Databases allows you with one command to build up both program databases prior to generating any of the foregoing reports*
QTR	• *Case Disposition – TANF and FS Reports allows the user to send to the screen or printer the noted report* • *Children/2Parent AU – TANF Report allows you to send to the screen or printer the noted report* • *Children Adults in HH – FS Report allows you to send to the screen or printer the noted report* • *Grant/Budgt Shelter - TANF allows you to send to the screen or printer the noted report* • *Citizenship Status – TANF and FS allows you to send to the screen or printer the noted report* • *Education Level allows you to send to the screen or printer the noted report* • *Adults w/Earned Income – TANF and FS allows you to send to the screen or the printer the noted report* • *Employment Status – TANF and FS allows you to send to the screen or the printer the noted report*

CHOICE (continued)	FUNCTIONS and DESCRIPTIONS (continued)
QTR (continued)	• *Average Unearned Income - TANF allows you to send to the screen or the printer the noted report* • *Type of Unearned Income – TANF allows you to send to the screen or the printer the noted report* • *Hours/Type Work - TANF allows you to send to the screen or the printer the noted report* • *Children Born on Aid – TANF and FS allows you to send to the screen or the printer the noted report* • *Cases w/Teen Parents - TANF allows you to send to the screen or the printer the noted report* • *Dollar Error Rates – TANF and FS allows you to send to the screen or the printer the noted report* • *Misspent Dollars – TANF and FS allows you to send to the screen or the printer the noted report* • *$ Errors by Client/Agency – TANF and FS allows the user to send to the screen or the printer the noted report* • *Build FNS Database is command that needs to be run prior to generating any of the aforementioned reports* • *Build AFDC Database is command that needs to be run prior to generating any of the aforementioned reports* • *Build Both Databases is a single command option that allows you to build up both program databases prior to generating any of the aforementioned reports*
HELP	• Release Notes allows you to access information on updated Q5 programming • *About Help provides user will on screen information showing basic configuration settings*

At the main CDSS logo screen, below the file menu choice, you also has direct access to the following options through the use of six graphic icons. The choices are as follows: "Open Worksheets"; "Run Consistency Edits"; "Send/Receive Data"; "Review Message Log"; "Print Worksheets"; and "Exit Systems". This method allows you quick entry to six basic functions of the Q5 system instead of having to use the "FILE" menu method that is described above.

With regard to the "REPORTS" menu option, please refer to Chapter 6 for a more complete description on the different options available and how to navigate within the various report options.

At the Q5 CDSS logo screen, move the mouse to the "FILE" **menu** choice and click the mouse once. When the menu appears, use the mouse and select the "OPEN Worksheets" option. Click the mouse once and this will bring you to the **"ASSIGNED CASES"** screen. In this screen, several **menu** choices are displayed. The choices are as follows:

<u>**CHOICE**</u>	<u>**FUNCTIONS and DESCRIPTIONS**</u>
FILE	• FACESHEET allows you to go to the facesheet screen • Comments allows you to write case related comments that will be fowarded with final case transmission • Private Comments is the same as the "comments" options except that these are not fowarded with final case transmission • Data Overview allows you to access an entire class

CHOICE (continued)	**FUNCTIONS and DESCRIPTIONS (continued)**
FILE (continued)	and household listing for a case file • Close allows you to close the screen
EDIT	• Delete Reviews allows you to delete a specified review **(****NOTE: THERE IS NO UNDELETE OPTION****)**
OPTIONS	• Mixed Case allows you to use a mixed case lettering style • Upper Case allows you to use Upper case lettering. • Sample Month Sort allows you to sort cases by sample month order • Review Number Sort allows you to sort cases by review number order • Status Sort allows you to sort cases by their status • Case Name Sort allows you to sort cases by case name order • Due Date Sort allows you to sort cases by due date order
HELP	• General Help allows you to access the General Help screen which provides you with general help information

If you access the General Help screen, you will find the following file menu choices:

CHOICE	**FUNCTIONS and DESCRIPTIONS**	
FILE	Open	• Provides you with file opening option
	Print Topic	• Provides you with

CHOICE (continued)	**FUNCTIONS and DESCRIPTIONS(continued)**	
FILE continued)		the option to print a specific topic
	Exit	• Takes you back to the assigned cases screen
EDIT	Copy	• Provides you with ability to copy a specific text using the "Clipboard Window" application
	Annotate	• Provides you with the ability to annotate text
BOOKMARK	Define	• Provides you with the BOOKMARK function
OPTIONS	Keep Help On Top	• Provides you with the ability to change location of "HELP" icon
	Display History Window	• Displays Windows History
	Font	• Allows you to change font size
	Use System Colors	• Allows you to switch to color system

CHOICE (continued)	FUNCTIONS and DESCRIPTIONS (continued)	
HELP	Version	• Provides you with information with copyright information
CONTENTS	Contents	• Provides you with general information
SEARCH	Search	• Provides you with the ability to obtain information using both a word and topic prompt
BACK	Back	• Returns you to initial Help screen
HISTORY	History	• Provides you with a secondary method of accessing help information
<<	Left Arrows	• Returns you back one screen level
>>	Right Arrows	• Forwards you one screen level
RETURN	Return	• Returns you to the Assigned Cases screen

Immediately following, you will see the available graphic icons (a complete description of these icons and their functions can be found in the glossary section of the manual). Below the icons, you will find the following information: review month, review number, status column (see the glossary for a definition of each respective code), case names, due dates and aid programs being reviewed. At the bottom, you will find several sorting options. The sorting feature provides you with the flexibility to display assignments in a way that assists in case management.

When you are ready to access a specific case file, move the mouse to the case desired. Click the mouse one time to outline the case selected. At this point, you may select either the Facesheet option or the **"DATA OVERVIEW"** screen. To open the Facesheet, select either the Facesheet icon or select the facesheet option on the file **menu**.

3. FACESHEET SCREEN

In this screen you have access to three case related information screens. You also have five different file **menu** choices that provide you with additional options. The options are as follows:

CHOICE	**FUNCTIONS and DESCRIPTIONS**	
FILE	Close	• Allows you to close the screen
EDIT	Undo	• Allows you to "Undo" the last entry
OPTIONS	Not Available	
GOTO	Goto	• Provides you quick access to any of the remaining two facesheet screens
HELP	Help	• Provides you with general help information for each level of

information in

CHOICE **FUNCTIONS and DESCRIPTIONS**

HELP (continued) the facesheet screen

If you click the mouse on the HELP menu choice, you will have the same additional file menu choices described in the Assigned Cases screen.

When these options are activated, the program defaults to the **"Programs"** screen. This screen provides you with information on the case name, review number and type, assigned and due dates, submitted (for review) date, signoff and rereview dates. This screen also provides you with space to type in the names of the analyst, supervisor, consultant, and manager.

At the bottom of the **"Programs"** screen, you have two additional options. You can either cancel the information just entered, or accept and save the information. After making the necessary entries in the "Programs" screen, you can continue to the **"Address"** screen.

4. ADDRESS INDEX

This screen provides you with information regarding the review number and type, case name, county name, state case identification number, and the full known address of the client as known in the agency case record. This will be the location for the case address.

You can change information in the county field by moving the mouse to the down arrow and clicking the mouse once. You will select the appropriate county name and click the mouse once. This will make the correction in the county field as noted. However, this information will be prepopulated at the time the case is downloaded to you. If any other information is discovered by you to be incorrect, move the mouse to the appropriate line entry, click the mouse once and type over and delete any information as necessary.

From this screen you will have the same menu choices as described in the beginning of this section. You will also have the choice of the cancel and ok buttons at the bottom of the screen. As with any screen, if you decide to delete any existing data, you can move the mouse to the cancel button and click the mouse once to delete the information. After all changes and corrections are made, move the mouse to the ok button and click the mouse once to save the information. At this point you can move the mouse to the "analyst" icon and click the mouse once. You will now be taken to the**"People"** index.

5. PEOPLE INDEX:

The **"People"** index is the location for data related to persons in the household. You can find the following screen information: review number and type, case name, PN (person number) as assigned to each person known to the case record, GROUP code as assigned to each person, person name, date of birth and social security number. Each class has a group code indicating the data requirements for persons in the home. Group codes appear at the bottom of the screen and are defined as follows:

GROUP CODE:

A = Member of Assistance Unit (AU)

B = Relatives, under same roof, not in the AU

C = Not Related, under same roof, not in the AU

D = Other (absent parent, etc.).

The **"PEOPLE INDEX"** is the **only** place in the Q5 program were you can add a person to a case review (YOU **CAN NOT** ADD A PERSON USING THE "LIST OF PEOPLE ICON"). To add a person move the mouse to the first available data entry line and click the mouse once so that the line is highlighted. Then move the move to the "group ID" column and click the mouse once. Type in the information as needed. “Tab” over to the “name” column and type the needed information. "Tab" over to the "Social

Security" column and type in the number. "Tab" over to the "Date of Birth" column and enter this information. You should repeat this step for as many people that need to be added. Once you complete the information for all persons, move the mouse to the "ok" button and click on the mouse to accept and enter the information. You should note that the Q5 system will automatically assign the next available person "ID" number. You will also have available the same "FILE" menu choices described at the beginning of this section. Once you determine the information is correct, move the mouse to the ok button and click once. This will take you back to the Q5 **"Assigned Cases"** screen.

*The **"PEOPLE INDEX "** of the FACESHEET is the **only** place in the Q5 program where you can change the group status code of persons in the case record.*

CHANGING GROUP CODE STATUS

After receiving the case assignment, you determine that a person is no longer in the case record and therefore not part of the case review. To remove that person, move the mouse to the data entry line were that person (PN) appears and click the mouse once and highlight the group designator column. Type the correct group designator code, then move the mouse to the ok button and click the mouse once to accept the information. If you need to change the group designator after entries have been made in the data detail level of the Q5 program, refer to section 4 of chapter II.

Once all needed changes are done, you can resume entering data or continue processing the case in the usual manner.

CHAPTER II

CASE DATA ENTRY

To enter case data, go to the **Q5 "ASSIGNED CASES"** screen. Select the case for data entry. Move the mouse to the "Data Overview" icon and click the mouse once. You also have the option to move the mouse to the **"FILE"** menu choice and click the mouse once, or you can select the **"DATA OVERVIEW"** option and click the mouse once. Both options in the Q5 take you to the **"DATA OVERVIEW"** screen.

1. DATA OVERVIEW SCREEN:

At the "**DATA OVERVIEW"** screen you will find identifying information such as the case name and review number. You will also have access to FIVE "**MENU"** choices. They are:

FILE MENU CHOICE

CHOICE	FUNCTIONS and DESCRIPTIONS	
FILE	Assigned Cases List	• Takes you back to assigned cases list
	Facesheet	• Takes you back to Q5 facesheet screen
	Comments	• Allows you to write comments that will stay with the case record when transmitted

***1. DATA OVERVIEW SCREEN (continued)*.**

CHOICE	FUNCTIONS and DESCRIPTIONS (continued)	
FILE (continued)	Priivate Comments	• Allows you to write comments that will not stay with case record when transmitted
	Class Comments	• Allows you to write "class specific" comments
	Data Detail	• Allows you to go to individual person household class entry
	Close	• Takes you back to Q5 Assigned Case list screen
EDIT	List People/F11	• Provides you with list of people in the household as known to case record
OPTIONS	Mixed Case	• Allows you to use mixed case lettering
	Upper Case	• Allows you to use mixed case lettering

1. DATA OVERVIEW SCREEN (continued)

CHOICE (continued)	**FUNCTIONS and DESCRIPTIONS (continued)**	
Goto	Goto Class/F2	• Allows you to access a specific class within a review
HELP	General	• Provides you with general help information as this relates to the DATA OVERVIEW screen
	Food Stamps	• Provides you with the FCS-310 regulations
	TANF	• Provides you with TANF regulations

If you click the "general" help option under the "HELP" file menu choice, you will find the same file menu choices found in the general help screen as described in the Assigned Cases screen. The only difference is that when you press return, you will go to the DATA OVERVIEW screen.

If you click either the "Food Stamps" or "TANF" options under the "Help" File menu choice (or the **"F"** or **"T"** graphic icon), the system will automatically default to the actual program related help screen. In this screen, you will have access to the same file menu choices as described under the "general" help option.

In the **"Data Overview"** screen, you have access to several icons. (The functions for these icons are described in the glossary section of this manual).

In the **"DATA OVERVIEW"** screen, you will see two identification boxes**.** On the left side of the screen is a class selection box. On the right side of the screen is the household selection box. The class box provides you with a complete class listing. The list of classes in this selection box will list only those classes that are related to the specific review type. For example, if the case is a "Food Stamps (FS) only" review, you will not see any classes related to non-FS requirements. If the selected case for review is an integrated case, all classes for both programs will be available. You will also note that next to each class number/title are the following identifying symbols: **"o"** is for classes that contain "ALWAYS" Required. A **"."** indicates a class that contains "IF PRESENT" Required. This code will also appear if no entries have been made in a specific class. A **"+"** indicates a class that has one or more entries required. Once all classes are completed as required, an **"x"** will appear. Classes that did not require entries will be identified by a **"."**.

The household selection box displays the type of entries that are required based on a "per person" or for the entire household. For example, in any review, class 111, is designated as a "GROUP A" class, i.e. receiving aid, all people receiving aid will be listed in this class. However, class 150-household composition, is listed as a "GROUP A, B, C," class, then all people known in the case record, irrespective of whether they are receiving aid, will appear in the household selection box. In a FS only review, the entries needed for the residency class (this is a FS only related class) will be identified as needed for the entire household. Once entries are completed for the specified class and person or household, both the class box and the household box will show a **"+"** next to the class as well as for the persons (or entire household) for which data has been entered. You will also see an "F2-goto" option in the middle of the screen, which allows you to access a specific class instead of scrolling through the class selection box. You will type in the class number, move the mouse to the "ok" button and click the mouse once. You can also press <enter> after typing in the class number. Both options will take you directly to the desired class. You are now ready to enter class specific data.

2. DATA DETAIL SCREEN:

To enter data in any class, you must go to the Q5 **"DATA DETAIL"** screen. There are two ways to access this screen. You can move the mouse to the selected class and click the mouse twice to select a specific class. You can also move the mouse to the selected class and click the mouse once to highlight the selection. Then move the mouse to the calendar/calculator icon and click the mouse once. Both methods will take you to the **Q5 "DATA DETAIL"** screen.

The **Q5 "DATA DETAIL"** screen is the location where you can enter case review data. Here you will find the case name, review number and review type. You will also find, depending on the class, a message box advising you that the class has more than eleven entries that need completion. The Q5 is programmed to default to the first person that is listed in the case record (i.e. person number "01"). Each class has been programmed with specific edits that prevent incorrect entries.

Each data entry screen is comprised of four columns: the first is the item description column; the second is an error identification column; the third is a value column and the only place where data is entered; and the fourth column identifies the type of entry needed for that class (either a code, a y/n answer, a numerical entry (date, dollar amount) or a narrative entry). The entry type and descriptions are listed below:

TYPE	**FUNCTION and DESCRIPTION**
Large	• 32 or less Characters
Small	• 12 or less Characters
Dollars	• nnn.nn
Code	• List

TYPE (continued)	**FUNCTION and DESCRIPTIONS (continued)**
MDY	• MM/DD/YY
MY	• MM/YY
State	• List of States
County	• County Number
Count	• nnn
Y/N	• Yes/No
PN	• Person Number

While in the **"DATA DETAIL"** screen and depending on the class chosen, you will find a maximum of three **identifying** options. The three options are **class, person** and **item**. Each of these **identifying** options has a **right** and **left** arrow. In most classes, the household composition class, class and person options will appear. If the class has these two options available, you can move to the prior or next class in sequence without returning to the data screen. You can also move to the next person in sequence within the same class. If you need to complete data entries for another person within the same class, move the mouse to the right arrow at the person option and click the mouse once. This will take you to the next person screen within the same class. Once all entries for all persons in the case record are completed, you can move the mouse to the right arrow at the class option and click the mouse once. To return to either the previous class or person, move the mouse to the left arrow at either the class or person option and click the mouse once. This will take you to the prior class or person.

In other classes, such as bank accounts, there is also a third option; the item option entry. As with class and person, the item option has a left and right arrow. If you are in the bank account class, you can enter data on multiple bank accounts for the same person.

If you click on the word "class" (between the right and left arrow buttons), the system will display a goto dialogue box. Type in the class number and press <enter>**.** The system will then take you to that class.

You have five available **MENU CHOICES** in the DATA DETAIL screen. The choices are as follows:

<u>FILE MENU CHOICES</u>

CHOICE	FUNCTIONS and DESCRIPTIONS	
FILE	Assigned Case List	• Takes you back to assigned case list
	Facesheet	• Takes you back to Q5 Facesheet screen
	Comments	• Allows you to go to comments screen which stay with the case record when transmitted
	Private Comments	• Allows you to go to comments screen which do not stay with the case record when transmitted
	Class comments	• Allows you to go to class specific comment screen
	Data Overview	• Returns you to Q5 DATAOVERVIEW Screen

CHOICE (continued)	FUNCTIONS and DESCRIPTIONS (continued)	
FILE (continued)	Close	• Takes you directly to the CDSS/Q5 main screen
EDIT	Undo	• Undo
	Delete	• Will delete an entry in a class you are currently working in and back to the DATA OVERVIEW screen
	Check Values Enter	• Enters data
	List of Codes/F12	• Provides specific codes for a specific entry within a class
	List of People/F11	• Provides you with the list of people as known to case record
	Ok/F9	• Accepts data in class that you is currently working in and returns you to the DATA OVERVIEW screen
	Mixed Case	• Allows you to use mixed case lettering

CHOICE (continued)	FUNCTIONS and DESCRIPTIONS (continued)	
GOTO	Goto Class/F2	• Allows you to jump ahead or jump back between classes while in the DATA DETAIL screen
	Previous Class/F3	• Allows you to move to prior person data entry field within the same class
	Next Class/F4	• Allows you to go to the next class
HELP this	General	• Provides you with general help information as relates to the DATA DETAIL screen
	Food Stamps	• Provides you with the FCS-310 regulations
	TANF	• Provides you with TANF regulations

If you accesses any of the three options available under the HELP file menu choice, you will have the same file menu choices as described in the DATA OVERVIEW section. The only difference is when you enter return in any of the options you will return back to the DATA DETAIL screen.

3. ENTERING DATA

When accessing the **“DATA DETAIL”** screen, the system is programmed to default to person coded "01" in the case record and to the first line of data entry. If the entry requires a code, move the mouse to the code icon and click the mouse once. You will see a code listing for that entry. Move the mouse to the proper code and click the mouse once to highlight the desired entry.   Then move the mouse to the "ok" box and click the mouse once. This will populate the data entry line with the selected code. If the entry requires a y/n, simply enter y or n on the data entry line, then press <enter>. This will fill the data entry line with the selected entry and move the cursor to the next data entry line. If the data entry required is dollars, such as the amount of rent paid, type in the appropriate amount. When the data entry is open-ended, like the name of a hospital or bank, type in the response. As indicated earlier, you are limited to 32 characters, including spaces per data entry line for a “Large” field and 12 characters for a “Small” field. Therefore, your typed response must be succinct. For a complete listing and description of data entries refer to the beginning of this section.

4. DELETING INFORMATION:

*If you enter incorrect information in an item or in an entire class, you must move the mouse to the **“TRASH BASKET”** icon and click the mouse once. This will remove the data from in its entirety from the system. Using the **delete button on the keyboard is not recommended**, because this does not remove all entries from the program memory. Using the **“TRASH BASKET”** icon, you insure that all entries are* *completely removed from the memory. This is essential in order to avoid obtaining incorrect edit messages when applying the **"RUN CONSISTENCY EDITS"** program of the Q5.*

*If in the course of completing a case review, you determine that a person's group designator needs to be changed, you will have to go to **<u>each class</u>** and use the **"TRASH BASKET"** icon to remove all entries for that person. You must do this prior to changing the group designator in the **"PEOPLE INDEX"** of the **"FACESHEET".** Failure to do this may cause inconsistent or incorrect edit messages when applying the **"RUN CONSISTENCY EDITS".***

<u>5. CLASS EDITS:</u>

The Q5 is also programmed to provide you with interactive class-line data entry specific edits. An edit occurs when you enter an unallowed entry during the completion of the Q5. For example, if you are in class 110 (Age) and enter an unallowed gender code, an edit will occur. The edit is identified by a dialogue box showing **"x=error"** message that appears just above the data entry field screen. In addition, **"x"** appears on the line with the data error. When this happens, the cursor automatically returns to the same line where the edit occurs.

You have several options to correct an edit. You can move the mouse to the code icon, click the mouse once and the coding options will appear. Then move the mouse to highlight the correct option and click the mouse once. Move the mouse to the ok button and click the mouse once. This will overlay the correct information on the data entry line that is causing the edit.

You can also access the codes by moving the mouse to the edit icon, click the mouse once to reveal the options. Then move the mouse to highlight the list of codes/F12 option and click the mouse once. You will see the coding options menu. If you know the correct coding entry, you can type the information and delete the incorrect entry. Then press <enter> or move the mouse to the ok button and click the mouse to accept the information. No edits exist for those fields identified as large or small, i.e. addresses school names, etc., so be sure you enter accurate and valid information.

6. CASE COMMENTS:

CLASS COMMENTS:

While in the "**DATA DETAIL"** screen, you will also have the option of writing either class specific or general case comments. In order to make a class specific comment, move the mouse to the class comments icon and click the mouse once. You can also move the mouse to the file icon, click the mouse once, highlight the class comments options and click the mouse once. Both methods will take you to the class specific comment screen. In this screen you make comments specifically related to the class in which you are entering data. Once the information is written, you will move the mouse to the ok button and click the mouse once. This will save the entry and take you back to the **"DATA DETAIL"** screen.

GENERAL CASE COMMENTS:

If you want to record general comments related to several classes or part of the overall analysis of the case review, you can do this in the case comments screen. Moving the mouse to the case comment icon and clicking the mouse once can access this screen. You can also accept this option by moving the mouse to the file icon, click the mouse once, highlight case comments option and click the mouse once. Both methods will take you to the case comment screen. This screen will allow you to record comments about the case that impact or clarify the overall case review findings.

The Q5 program also allows you the option of recording comments that are not part of the review. These comments can be recorded and are not SAFED with other data. This option allows comments to remain at the county level and not forwarded with the final case findings.

7. MOVING TO THE NEXT CLASS:

After all entries are completed for a class, you can go to the next class in several ways. You can move the mouse to the arrow right at the class option and click the mouse once. The next class in numerical sequence will be displayed. You can move the mouse to the ok button and click the mouse once, and return to the **Q5 "DATA OVEVIEW**" screen, then either scroll in the class selection box or move the mouse to the desired class**.** At the desired class the Q5 user will click the mouse once to highlight the selected class. Move the mouse to the data detail icon and click the mouse once. The Q5 program will display the next class selection. Repeat the above steps to enter data in as many classes that are required to complete a case review.

8. EXITING THE DATA DETAIL SCREEN

To exit the **"DATA DETAIL"** screen move the mouse to the “ok” button and click the mouse once. You will return to the **"DATA DETAIL"** screen. Move the mouse to the exit icon and click the mouse once. This will take you back to the main Q5/CDSS logo screen. You can return to the main Q5/CDSS logo screen by moving the mouse to the file **menu** choice and click the mouse once again, then highlight the close option and click the mouse once. This will return you to the main Q5/CDSS logo screen. You are now ready to run the final edit and consistency check program for the case just completed.

CHAPTER III

EDITS:

Edits and consistency checks are needed to insure accuracy and consistency in the data collection process and to maintain data integrity. The Q5 program has two types of edit and consistency checks. The first type of edit is an edit within a class that will not allow you to proceed to the next class until corrected. This edit type has been discussed in chapter two. There are also cross class review edits that must be run at the completion of data entry and prior to case transmission.

1. RUNNING CROSS CLASS EDITS:

In order to run cross class edits you must be at the main Q5/CDSS logo screen. Move the mouse to the "FILE" option and click the mouse once. Highlight the "RUN CONSISTENCY EDITS" option and click the mouse once (this same option is available by clicking on the 'RUN CONSISTENCY EDITS" icon that appears on the main screen). The screen will show various message boxes that require you to make a choice. The first box will ask you to select how you want to edit a review. The choices are as follows: you can edit by review number, by sample number or by analyst name. The second box identifies the sample month. You can change the sample month by moving the mouse to the "arrow down" button and clicking the mouse once. This will bring down various sample months that are available through December 1998.   The third box identifies the county being selected. You can change the county by following the same procedure for changing the sample month. The fourth box will identify all reviews that are available for the edit review process. The last box asks you where the report is to be sent. You will have two options: you can select to send the edit report to the screen, or you can send the report to the printer. Once you make the appropriate selection, you will move the mouse to the "ok" button and click the mouse once. When the system is finished running edits, the Q5 program will default to the **"Edit Results"** screen. On this screen all edits for the selected case will be displayed.

You will also have a choice of four file menu choices. The choices are:

CHOICE	FUNCTIONS and DESCRIPTIONS	
FILE	Print	• Allows you to print an edit report
	Print Set Up	• Allows you to set up the receiving printer
	Save Report	• Allows you the option of saving an edit report
	Open Report	• Allows you to open a specific file
	Continue	• Returns you to the Q5 main logo screen
	Hold	• Provides you with a secondary file saving format
	Exit	• Returns you to the Q5 main logo screen
	Exit All	• Same as Exit function
EDIT	Select All	• Highlights all lines in the edit report
	Goto Line	• Allows you to go

directly to a specific

CHOICE (continued)	**FUNCTIONS and DESCRIPTIONS continued)**	
EDIT (continued)		line in the edit report
	Goto Page	• Allows you to go to a specific page in the edit report
	Find	• Provides your with a search option
WINDOW	Zoom	• Allows you to change the font size on the screen (only)
	View Images	• Allows for viewing images
HELP	Contents	• Provides you with general information on how to use the HELP function
	Using Help	• Provides you with a secondary menu of general information for using HELP
	About Help	• Provides you with copyright information

2. READING AN EDIT REPORT

Once the Q5 program has finished running the cross class edits program, the report will be sent to the screen or the printer depending on what you have chosen. In either selection, you will find the following information for each edit report.

The first line will identify the review number and review type, along with the case name. The area below this line will also show any Federal FS edits.

The second line will identify the class name and the type of edit that was obtained. The different options could be, "STATE EDITS which are related to the TANF program; "INCOMPLETE ITEMS" meaning that there is an item in a class that is not complete; or "REQUIRED ITEMS THAT ARE MISSING or BLANK", meaning that you have left a class with a line entry which the system recognizes as needing an entry. You need to complete any line entry that is identified as either "INCOMPLETE" or "REQUIRED ITEMS THAT ARE MISSING or BLANK".   The Q5 system is designed to prevent you from sending a completed case without "clearing" these two edits.

The next line will identify the actual name of the household member on which the system is identifying an edit or will identify the edit as being for the entire household, i.e. "AU MEMBERS", "FAMILY MEMBERS", etc. If the edit is identified by the name of the household member, immediately next to the name will be that persons "PERSON ID" number, and when applicable, the record number. Record number occurs in those classes such as 211, where a person can have more than one item. Therefore, if the edit reads for class 211, Jane Doe, 01-02, this means the edit occurred on person number 1-Jane Doe, in record number 2 of bank accounts. Right next to this information will be the actual edit identification number and the corresponding description.

NOTE: *Although most FS edits will be identified as a warning, which does not stop you from downloading completed cases, there are a few which are "fatal" which will inhibit you from "downloading" a completed case. You will need to contact your PIA to obtain the necessary codes to "clear" edits and complete the case.*

While in the "Edit Results" screen, if you click the "HELP" file menu choice, the "Contents" or "Using Help" subchoices, you will be provided with the same file menu choices that are found at the same level as in the "Assigned Cases" screen.

You can print a copy of the edit report, and, you have several ways of printing the report. First select the "send to printer" that appears on the screen when the edit worksheet option is first accessed. Another option is to select "print" that is available under the **"FILE"** menu choice in the "edit results" screen. A third option is to exit the edit results screen and return to the main logo screen. Then move the mouse to the **"FILE"** menu choice and click the mouse once and highlight the "Reprint Last Edit Report". Then you can have the edit report sent to the screen or to the printer. After you decide how to view the report, move the mouse to the "ok" button (or cancel button if you need to cancel the process) and click the mouse once. The Q5 will then display or print the report. If you send the report to the printer, the system will automatically return you to the Q5 main logo screen while the system is printing the report. If you select the "display" option, you will be taken to the **"Edit Results"** screen. When you are finished reviewing the information, move the mouse to the **"FILE"** menu choice and click the mouse once to exit. Highlight the exit option and click the mouse once. This will take you back to the Q5/CDSS main logo screen. At the bottom of the Q5/CDSS main logo screen, you will see the following message: **“Edit Report Complete”**

CHAPTER IV

COMMUNICATIONS:

1. PROCESSING CASES:

When a case is initially assigned to the reviewer, the case review will appear with a "blank" status code. Once any data is entered in the case, the case is placed in status "A". The "A" allows for additions, modifications or any other changes to be made to the case. (A complete description of the status codes is found in the glossary section of this manual)

When you complete a review, the Q5 software allows you to decide whether to send a copy of the case or the original. For example, if you want peer input on a case prior to final transmission, you send a copy of the case ("A" status). The status of the case will appear on the receiving Q5 assigned cases list as a copy ("Z" status). The sending analyst will retain the original. Once you receive peer imput via phone or fax, the revisions can be incorporated into the original case and then run edit consistency program. At this point, if the review "clears" edits, the review will then be placed in "B" status. The case is now ready to be transmitted. Once the "B" status case is transmitted, the case is placed in "C" status. No further changes can be made on a case in "C" status. If at a later date, additional changes are required, the case must be placed in "A" status. Currently, the Systems Maintenance Unit can change case status from “C” to “A”. Once the case is in “A” status, you can make the necessary changes to the case.

2. STORAGE AND FOWARDING ENVIRONMENT (SAFE)

SAFE is the network for transmitting cases between CPS counties and FOB offices throughout California. In order to use the SAFE network, a modem is required to transmit and receive data. In addition, the FOB provides all users of SAFE with a code that allows access to the network.

In order to transmit via SAFE, you must be at the main CDSS logo screen. Move the mouse to the file choice and click the mouse once. Highlight the **"SEND/RECEIVE DATA"** option and click the mouse once. This will take you to the "**SEND/RECEIVE DATA"** screen (SAFE). In this screen you will see two dialogue boxes. The first box is the **"to receive reviews"** box. The second box is the **"to send reviews"** box. In the option **"to receive reviews"** box you have three options: "no" to stop the process; "yes from SAFE"; "yes from diskette". In the option **"to send reviews"** box, you have the same three choices described above. However, while in this box, if you select the option "yes from SAFE", you have with two additional dialogue boxes, each with three options. The first box will ask you to select how the reviews are to be sent. You will be prompted with three options: you can send reviews by review number; by sample month; or by analyst name. The second dialogue box will ask you to choose from the following three options: send a copy of the review; send the original or send the entire sample.

Whenever you select to receive or send reviews via the SAFE system, you are prompted with three additional options. They are “9” for an outside line,” 909” area code; and whether” 1" is needed to dial long distance. Once you select your options, you can send reviews via SAFE. When cases are sent, the system automatically returns you to the main logo screen. At the bottom of the screen, you will see a message indicating that the “SAFE” process has either failed (and to retry) or that the process has been completed without any problems.

You can verify the status of the case sent through SAFE by accessing the 'Review Message Log". Refer to chapter seven for more information.

CHAPTER V

STORAGE AND BACKUP OF CASES

BACKGROUND:

The backing up of the computer hard drive is necessary to avoid accidental loss of any information. It is strongly recommended that, at a minimum you back up the computers hard drive daily. Prior to backing up information, you should insure that the diskette is format ready.

With the Q5 system, you have several backup related options available. To access the backup options, at the main logo screen, move the mouse to the **"utility"** menu option, and click the mouse once. Then highlight, any of the three following options: BackUp Data; Test BackUp Diskettes; Restore Data.

Under "Backup Data", you can backup Q5 data by following the on screen instructions. Under "Test Backup Diskettes", you can test the diskettes for any potential defects. It is recommended that diskettes be tested for possible viruses. Under "Restore Data", you can restore any lost data related to Q5. This feature, however, will only restore data in the screen you are currently in.

DAILY, WEEKLY AND MONTHLY BACKUP (RECOMMENDED POLICY)

Daily Backup:	Label a diskette "Daily Backup" to use at the end of each workday. For laptop user's, this diskette should not be kept in the carrying case of the laptop, but in a secure area.
Weekly:	At the end of the workweek and after the daily back up procedures, you is to remove the diskette from the computer, and use this diskette as the daily back up the following week.

DAILY, WEEKLY AND MONTHLY BACKUP (RECOMMENDED POLICY) (continued0

Monthly:	On the last workday of each month and after the daily backup, remove the diskette and change the "Daily" on the label to "Monthly, and be stored by you for three years.

CHAPTER VI

REPORTS:

The Q5 program “Reports” option at the main logo screen allows you to either display a report on the screen or send to the printer. To access this function from the main logo screen, move the mouse to the "REPORT" file menu choice and click the mouse once. Then select the options shown.

The following are detailed instructions on using "REPORTS" if they are sent to the screen:

- A: "Worksheet All Sections"
- B: "Worksheet Facesheet"
- C: "Worksheet Data"
- D: "Worksheet Comments"
- E: "Food Stamp Budget Worksheet"

In all of the above choices, you will select reviews either by review number, case number, or by analyst. You will also select the appropriate sample month and county. You will then select the cases that are needed. You then will select the cases, and send them to the screen or the printer. If you request multiple reports under choice "A” the system will first produce the "FACESHEET" section of each review selected. The report will be produced in numerical order. In order to access all facesheet sections of each review requested, "scroll" down using the down arrow button. To expedite the scrolling down process, move the mouse to the arrow down button and press the “page down” buttons on the keyboard, the system will take you to the next page which is the "FACESHEET" of the next review. Once all "FACESHEETS" have been reviewed, move the mouse to the "FILE" menu choice, click the mouse once, then move the mouse and click on the "CONTINUE" option. The system will now produce all available "COMMENTS" for each review requested. These will also be produced in numerical order and can be reviewed using the same method described to review the "FACESHEET" section. The system will only produce comments from those areas or classes where they are present. Once all comments are reviewed, move the mouse to the "FILE" menu choice and click the mouse once. Then move the mouse to the "CONTINUE" option and click the mouse once. The system will reproduce the Q5 worksheet for all cases selected. The reports will be produced in numerical order. The report will produce classes for which data has been entered. In order to review the entire worksheet for each case, move the mouse to the down arrow button and click the mouse to review the worksheet or press the down arrow button on the keyboard to scroll down the entire worksheet. If you do not need to review all of the worksheet, you can press the page down button on the keyboard and you will be taken to the next review. After you complete the review, move the mouse to the "FILE" menu and click the mouse once. Select either "EXIT" or "EXIT ALL", you will return to the main logo screen. Any time you request multiple reports under any of the other choices that are listed at the beginning of this section, you will need to follow the previously described directions.

CHAPTER VII

SUPERVISORY FUNCTIONS:

RECEIVING AND ASSIGNING REVIEWS

Each month several samples (TANF, FOOD STAMPS, CLOSED CASES, etc.) will be selected and distributed to the CPS counties via SAFE. The county supervisor or their designee should log onto SAFE on a daily basis to check for any case transmissions.

DOWNLOADING SAMPLE CASES:

In order to download the county case samples select the "FILE" menu choice at the CDSS main logo, then choose 'SEND/RECEIVE DATA". Two boxes with messages appear on the "SEND/RECEIVE DATA" screen. Move the mouse to the box that reads "DO YOU WANT TO RECEIVE REVIEWS?" and select "Yes, from SAFE." Do this by moving the mouse to the circle in front of the message and clicking the mouse once. The second message in the second box reads "DO YOU WANT TO SEND REVIEWS?" The "NO" response is already selected. Once these two choices are completed the supervisor can move the arrow to the "OK" button at the bottom of the screen. The computer will then access SAFE and download the sample to the county main computer.

ASSIGN WORKSHEET SCREEN:

Once cases are downloaded, return to the CDSS main logo and select "ASSIGN WORKSHEETS" from the "FILE" menu.

SCREEN FEATURES:

The "ASSIGNMENT SCREEN" consists of five columns. Only the supervisor is able to assign cases or change the status of cases using the “S” (status) column and the “ANALYST” number column.

The first column, "REVIEW" will list the case review number. The second column, "CASE NUMBER", will list the case number. The "S" column lists the case status when received from the SAFE system (blank, skeleton, etc.). In the "ANALYST" number column enter the four-digit reviewer number. The "ANALYST NAME" column will list the name of the analyst and serve as a way to confirm the case assignment.

<u>CASE ASSIGNMENTS:</u>

Using the mouse, move the arrow to the "SAMPLE MONTH" box. This area identifies the sample month in the "ASSIGNMENT SCREEN". In order to go to a different sample month than is shown in this box, use the mouse to move the arrow to the "down arrow button" and click the mouse once. Upon doing this, a sample month selection box will appear. By using the up arrow and down arrow buttons, select the appropriate sample month. The other box on the screen identifies the sample county. This box and its county selection can also be changed by moving the mouse to the "down arrow button" and clicking the mouse once. A sample county list will appear and the supervisor can select a different sample county.

Once the appropriate sample month and sample county are selected, the supervisor is ready to assign cases. Using the mouse, move the mouse to the first line of the case assignment screen and double click the mouse at the analyst number column (the cursor should be flashing in the analyst column of the first line). This action will simultaneously highlight the first line and activate the analyst column. In the analyst number column, type the four-digit analyst I.D. number. Without pressing any other key's, press the "down arrow" key to move the cursor to the next line, while remaining in the analyst column. Note that once the "down arrow" key is pressed, the system will automatically completes the analyst name. Type the four digit analyst I.D. number again and use the "down arrow" key to move to the next line. Repeat these steps until all cases are assigned. After completing this step will move the mouse to the "OK" button at the bottom of the screen and click the mouse once. Return to the main menu screen.

NOTE: Before clicking the "OK" button the supervisor may want to sort the sample assignment by analyst number. Moving the mouse to the “SORT can do this BY ANALYST NUMBER" box in the lower left-hand side of the screen. Place the mouse in the box and click the mouse once. Analyst number will then sort all cases. This option will provide the supervisor the opportunity to view all cases for a sample month and to which analyst each case was assigned. Also, using this feature will facilitate the actual downloading of the assignment in the Send and Receive Data Screen.

SENDING CASES TO ANALYSTS:

After assigning all cases in the "ASSIGNMENT SCREEN", return to the CDSS main logo screen. Choose "SEND/RECEIVE DATA" from the "FILE" menu.

At the "SEND/RECEIVE DATA" screen, the supervisor will see two message boxes. The first box asks, "DO YOU WANT TO RECEIVE REVIEWS?” Move the mouse to the "NO" selection circle and click the mouse once on this selection. Move the mouse to the second message box that asks, "DO YOU WANT TO SEND REVIEWS?” Move the mouse to either: "YES, to SAFE" or "YES, to DISKETTE", depending upon the county system configuration. After making the appropriate selection, six additional message boxes will appear on the screen. All boxes must be completed in order to assign cases either by diskette or SAFE.

The first box is the "TO" box. Move the mouse to the box next to the "TO" and click the mouse once to activate this box. Once this is done, enter the analyst's three-digit number and click the "OK" button. The next box asks, "HOW DO YO WANT TO SELECT REVIEWS TO SEND?” You have three choices: "BY NUMBER", "BY CASE NUMBER", and "BY ANALYST". Move the mouse to the appropriate selection and click the mouse once. Usually, when making the initial monthly assignment it is strongly recommended that the "BY ANALYST" option be used. This selection will send all of the months assignment on a person by person basis.

The next box asks, "WHAT KIND OF REVIEWS DO YOU WANT TO SEND?" You have three choices: "ORIGINAL (B), "COPY (ABCZ)", and "SAMPLE ()". Move the mouse to the appropriate selection and click the mouse once. The program offers the three choices as follows. For the supervisors use, the supervisor should only be concerned, at this time, with item number three (we are listing the three choices here as this is how the screen appears).

1. "ORIGINAL (B)": This option is used when a case is ready to be sent to PASU in Sacramento. This is a case that is in "B" status and has cleared all applicable edits. Once this case is forwarded to Sacramento, the supervisor's copy of this case will no longer accept any type of entry or modification. The case status reverts to "C".

2. "COPY (ABCZ)": This option allows the supervisor to send a copy of a case in any of the above mentioned status (ABCZ) codes.

3. "SAMPLE": This option allows the supervisor to send cases in a sample to the reviewer.

NOTE: Please refer to **<u>CHAPTER 4</u>** for additional information regarding case processing.

Additionally, three boxes will provide information about the cases being transmitted. The first box is "SAMPLE" which lists the review month to be searched. Select the appropriate review month in order to select the cases to be sent. The second box is "COUNTY" which identifies the county where cases will be searched. Select the

appropriate county in order to select the cases to be sent.
The third box will display all cases that meet the selection and assignment criteria (analyst, review month, etc.) that the supervisor has determined for each transmission. At this point the SAFE/DISKETTE transmission can take place.

CHAPTER VIII

AD HOC REPORTS:

The Q5 system allows you to send to the screen or printer "AdHoc" Reports. This option is found at the main logo screen under the "AdHoc" "FILE" menu choice.

These reports are primarily for supervisors and or Sacramento CPU staff. Refer to the AdHoc training manual that was provided to them by Databuilders for detailed instructions.

<u>QCIS MISCELLANEOUS REPORTS (SELECTION "C", REPORTS II MENU)</u>

1. Report Title: COUNTY CASELOAD MANAGEMENT REPORT
   Location: Selection 1 on QCIS Miscellaneous Reports menu
   Description: Provides a listing of case processing status including key dates for all cases by analyst. Will sort by county district office and by type of case (i.e., federal sample or state sample).

2. Report Title: REVIEW STATUS SUMMARY BY SAMPLE MONTH REPORT
   Location: Selection 2 on QCIS Miscellaneous Reports menu
   Description: Provides a summary of case processing status for selected sample months.

3. Report Title: LISTING OF OUTSTANDING REVIEWS BY QC ANALYST
   Location: Selection 3 on QCIS Miscellaneous Reports menu
   Description: Provides a listing, by county district office, of all cases in a particular review month not yet submitted to the REB district office. Will sort by type of case (i.e., federal sample or state sample).

4. Report Title: COUNTY ROLLING ERROR RATE REPORT
   Location: Selection 4 on QCIS Miscellaneous Reports menu
   Description: Provides county case review disposition and finding results including error rate detail for the current cumulative period and the prior year cumulative period. It also provides the difference between the two periods and the case review results for the current

month just transmitted to KCCC. Will sort by county district office and by type of case (i.e., federal sample or state sample).

5. Report Title: DISTRIBUTION OF DISCREPANCIES BY TYPE OF AGENCY AND PARTICIPANT ERROR (two separate reports, one for AFDC primary errors, the other for Food Stamp primary errors)

Location: Selection 5 on QCIS Miscellaneous Reports menu

Description: Provides dollar totals of agency and client errors by type of error (i.e., ineligible, overpayment and underpayment). Will sort by county district office and by type of case (i.e., federal sample or state sample).

6. Report Title: BY AGENCY, BY PARTICIPANT ERROR, PRIMARY FOOD STAMP ERRORS WITH DOLLARS GREATER THAN 0 (OIB TABLE 1 - two reports, one covering case counts, the other dollar amounts)

Location: Selection 6 on QCIS Miscellaneous Reports menu

Description: Case counts and error dollar amounts by cause (i.e., agency vs. client) and type (i.e., ineligible/overissuance and underissuance). Will sort by county district office and by type of case (i.e., federal sample or state sample).

7. Report Title: ERRORS BY ELEMENT, PRIMARY FOOD STAMP ERRORS WITH DOLLARS GREATER THAN 0 (OIB TABLE 2 - Six reports, three covering dollar amounts and three, case counts)

Location: Selection 7 on QCIS Miscellaneous Reports menu

Description: The dollar errors and the error case counts are arrayed by error elements according to type of error and case counts vs. dollar error amounts. Will sort by county district office and by type of case (i.e., federal sample or state sample).

8. Report Title: QCIS CASE FOLDER LABEL MAKER
Location: Selection 8 on QCIS Miscellaneous Reports menu
Description: Prints a label for every AFDC and Food Stamp case in the review sample for a given month.

AFDC FEDERAL TABLES (SELECTION "A", REPORTS II MENU)

9. Report Title: DISPOSITION REPORT, AFDC Program
Location: Item 1 on AFDC Federal Tables menu
Description: Provides listing of AFDC cases including detailed error information. Will sort by county district office and by type of case I.e., federal sample or state sample).

10. Report Title: AFDC QC - STATISTICAL SUMMARY (AFDC Table 1)
Location: Item 2 on AFDC Federal Tables menu
Description: Provides statistical summary data on the number of AFDC cases sampled/selected, completed and not completed. The cases not completed are summarized by cause. The completed cases are summarized by the findings (i.e., correct, ineligible, overpayment

or underpayment). For these cases the total numbers and dollar amounts are indicated. Will sort by county district office and type of case (i.e., federal sample or state sample).

11. Report Title: AFDC QC - NUMBER OF ERROR CASES BY TYPE OF AGENCY AND CLIENT ERROR (AFDC Table 2)

Location: Item 3 on AFDC Federal Tables menu

Description: Provides a case count of agency and client errors by type of error (i.e., ineligible, overpayment and underpayment). Will sort by county district office and by type of case (i.e., federal sample or state sample).

12. Report Title: AFDC QC - TOTAL NUMBER OF ERROR DOLLARS FOR ALL ERROR CASES (AFDC Table 3)

Location: Item 4 on AFDC Federal Tables menu

Description: Provides the dollar errors broken out by error element and cause (i.e., agency or client). Will sort by county district office and by type of case (i.e., federal sample or state sample).

13. Report Title: AFDC QC - TOTAL NUMBER OF ERROR CASES AND ERROR PAYMENTS BY EACH ELEMENT IN ERROR AND TYPE OF ERROR (AFDC Table 3a)

Location: Item 5 on AFDC Federal Tables menu

Description: Number of cases and dollar error amounts by error element and type of error (i.e., ineligible, overpayment and underpayment). Will sort by county district office and by type of case (i.e., federal or state sample).

14. Report Title: AFDC QC - PROFILE OF TOTAL NON-ERROR AND ERROR CASES BY SPECIFIED CHARACTERISTICS (AFDC Table 4)
Location: Item 6 on AFDC Federal Tables menu
Description: Breakdown of reviewed cases by household characteristics and errors within the characteristic categories. Will sort by county district office and by type of case (i.e., federal sample or state sample).

FOOD STAMP FEDERAL TABLES (SELECTION "B", REPORTS II MENU)

15. Report Title: DISPOSITION REPORT, Food Stamp Program
Location: Item 1 on Food Stamp Federal Tables menu
Description: Provides listing of Food Stamp cases including detailed error information. Will sort by county district office and by type of cases (i.e., federal sample or state sample).

16. Report Title: FNS - STATISTICAL SUMMARY (FNS Table 247.1)
Location: Item 2 on Food Stamp Federal Table menu
Description: Provides statistical summary data on the number of FS cases sampled/selected, completed and not completed. The cases not completed are summarized by cause. The completed cases are summarized by the findings (i.e., correct, ineligible, overissuance

or underissuance). For these cases the total numbers and dollar amounts are indicated. Will sort by county district office and by type of case (i.e., federal sample or state sample).

17. Report Title: DISTRIBUTION OF VARIANCES BY TYPE OF AGENCY AND PARTICIPANT ERROR, PRIMARY FOOD STAMP ERRORS WITH DOLLARS GREATER THAN 0 (FNS Table 247.2)

Location: Item 3 on Food Stamp Federal Table menu

Description: Provides the number of error cases by cause (i.e., agency or client) and by the type (i.e., ineligible, overissuance and underissuance). Will sort by county district office and by type of case (i.e., federal sample or state sample).

18. Report Title: DISTRIBUTION OF VARIANCES BY PROGRAM AREA: PRIMARY FOOD STAMP ERRORS WITH DOLLARS GREATER THAN 0 (FNS Table 247.3)

Location: Item 4 on Food Stamp Federal Table menu

Description: Provides the number of error cases by eligibility element and cause (i.e., agency vs. client). Will sort by county district office and by type of case (i.e., federal sample or state sample).

19. Report Title: DISTRIBUTION OF VARIANCE AMOUNTS BY PROGRAM AREA: PRIMARY FOOD STAMP ERRORS WITH DOLLARS GREATER THAN 0 (FNS Table 247.4)

Location: Item 5 on Food Stamp Federal Table menu

Description: Provides the dollar value of errors by eligibility element and cause (i.e., agency vs. client). Will sort by county district office and by type of case (i.e., federal sample or state sample).

20. Report Title: AVERAGE VARIANCE AMOUNT BY PROGRAM AREA: (FNS Table 247.5)

Location: Item 5 on Food Stamp Federal Table menu

Description: Provides the number of errors, the total dollar value of the errors and the average dollar value of the errors by error element. Will sort by county district office and by type of case (i.e., federal sample or state sample).

CHAPTER IX

MISCELLANEOUS:

REVIEW MESSAGE LOG

The Q5 system allows you an additional option to assist in case management.

This additional feature is the "REVIEW MESSAGE LOG". Although the primary purpose of this feature is to provide a "message space" for you when sending and receiving reviews through the SAFE system, the "REVIEW MESSAGE LOG" will also provide you with information related to transmissions involving diskettes.

At the "Main Logo" screen, move the mouse to the "FILE' menu choice and click the mouse once. Move the mouse and highlight the "Review Message Log" and click the mouse once. You will then be prompted with two message boxes. In the first box, you will be asked which type of messages is required. You can request the "last action"; you can request “all messages received for the day”; you can request “all messages received for the entire month”; you can request all of the above type of messages.

In the second box, you will be prompted with two choices; You can have the information sent to the screen or be sent to the printer. If you select the information be sent to the screen, the "REVIEW MESSAGE LOG" screen will appear. At this screen, you have four file menu choices. The choices are as follows:

CHOICE	**FUNCTIONS and DESCRIPTIONS**	
FILE	Print	• Allows you to print a message log report
	Print Set Up	• Allows you to set up the receiving printer
	Save Report	• Allows you to save the message log

		requested
	Open Report	• Allows you to open a previously saved message log report
	Continue	• Returns you to the Q5 main logo screen
	Exit	• Takes you back to the main logo screen
	Exit All	• Same function as EXIT
EDIT	Select All	• Select All
	GoTo Line	• Allows you to go directly to a specific line in the message log report
	GoTo Page	• Allows you to directly go to a specific page in a message log report

<u>CHOICE (continued)</u>	**<u>FUNCTIONS and DESCRIPTIONS (continued)</u>**	
EDIT (continued)	Find	• Provides you with a search option
WINDOW	ZOOM	• Allows you to change the font size on the screen (only)
HELP	Contents	• Provides you with

	general help information relative to the message log screen
Using Help	• Provides you with a secondary menu of general information for using HELP
About Help	• Provides you with copyright information on HELP

Below the file menu choices, you will see the information related to both sending and receiving case reviews through the SAFE system. The log will show you the time the call to SAFE started and ended; which analyst sent or received cases; the time the case was sent (or received); the review number; sample month; county ID number; state ID number; analyst ID number, review type, i.e. a copy, a sample or the original; whether the case already exists on the Q5 database; status (same as type); and error code (the error code description will be described at the bottom of the log). If you request any option other than "Last Action", scroll down using the down arrow button in order to access all available information. Once you review the information, highlight either "exit all" or the "exit" option. Either choice will take you back to the main logo screen

DROPPING/ADDING PROFILES

Occasionally, you will need to drop a case. In the **Q5** system, you now drop profiles.

Whenever you need to drop a profile or profiles, from the CDSS main menu select the **UTILITY** menu choice and click the mouse once. Then highlight and click on "DROP/UNDROP PROFILES". In the 'DROP/UNDROP CASES" screen, you will see a sample month box, a county ID box, and an identification box which shows all available reviews by review number and type, case number, their status and the known case name. Right next to this box, you will see two button commands; one is "change" and the other is "close".

Select the correct sample month by moving the mouse to the sample month box and click the down arrow to select the appropriate month. Do the same for the county ID box. With the mouse select the case to be dropped and will click the mouse once. Move the mouse to the "change" button and click the mouse once. You will go to the "CHANGE DROP STATUS" screen. You will see identifying information such as the review number and type, case name and numbers and the current status. You will also see an additional line item, with the current profile of the case. Immediately to the right of this line, you will see two boxes: one is "ACTIVE" and the other is "DROP". If the current case selected is "active", it will have a "checkmark". Move the mouse to the "drop" box and click the mouse once. This will "drop" the active profiles of the case. Move the mouse to the "ok" button and click the mouse once. You will return to the previous screen where the case that was dropped will now have it's review type letter i.e., "C", "T" or "FT" (the letter next to the review number) converted to lower case letter. This is confirmation on the screen, that the "drop" procedure was successful. Move the mouse to the "ok" button and click the mouse once. You go back to the CDSS main menu screen. Repeat the above steps if needed to drop additional profiles. If you need to reactive the profile, repeat the same procedure, except that instead of clicking on "drop" box, click on the "active" box. The profiles (with entries) will return to the selected case and the identifying review type letter will be return to upper case.

If you select a printed copy of the dropped case, you will only obtain a printed facesheet and the appropriate disposition code sheet.

ADDING CLOSED CASE WORKSHEETS:

At the Q5 Main Menu Screen, move the mouse to the "UTILITY" menu and click the mouse once. Highlight "ADD WORKSHEET" and click the muse once. You will see the "ADD WORKSHEETS" screen. Please refer to the attachment section of this chapter for screen examples. At any time during the process of adding a closed case review, you may terminate the action. Move the mouse to the "clear" button on the lower right hand corner and click the mouse once. This will clear all entries and allow you to either restart the procedure or, if necessary, to exit the option.

The following 10 steps provide you with instructions on adding closed cases:

STEP 1: *When first accessed, the system will default the cursor to "Box 1- Review". This box is where you will enter the case review number. When entering the review number, you must include "97"(referring to the current fiscal year) and "0" as the prefix for the review number (i.e., 97015001).*

Step 2: *Once the review number is entered, tab to the next entry, "Box 2 - Sample". This is where the sample month is entered. The sample month should be entered as a four-digit code (i.e., 0997, 1097).*

STEP 3: *Once completed, tab to "Box 3 - Case". Enter the appropriate full county case number. When making this entry, the number should reflect the full county case number and should not have any dashes (i.e., 193501234567). The first two numbers are the county numbers. The next two numbers are the case aid code (09, 30, and 35).*

ADDING CLOSED CASE WORKSHEETS (continued):

The full county case number then follows the aid code.

STEP 4: *Tab to "Box 4 - County". Enter the three digit County ID number (i.e. 019).*

STEP 5: *Move the mouse to "Box 5 - Profile". You will move the mouse to the first line and click the mouse once in the "Profile Column". Enter **(using upper case***

letters) *TCLO for TANF closed cases or FCLO for Food Stamp closed case.*

STEP 6: *Tab to the "Assigned Column" and enter the date the review was assigned (i.e. MM DD YY=060197).*

STEP 7: *Tab to the "Due Column" and enter the due date (i.e. MM DD YY=083197).*

STEP 8: *Move the mouse to "Box 6 - NAME". Click the mouse once on the first line in the "Name Column". Enter the appropriate case name.*

STEP 9: *Tab to the "Group Column" and enter "A" as the identifying person profile. (You can enter the date of birth and social security numbers if available.)*

STEP 10: *Move the mouse to the "Box 7 - Analyst". Enter the appropriate four-digit analyst identification number. Once the analyst identification number is entered, the cursor automatically moves to the next line where you will enter the last and first name of the case name that is being added (this will usually match the information typed in "Box 6 - Name" box). You are also able to enter the address, phone number and directions to the residence of the client of the case under review If available.*

Once all of the above steps are followed move the mouse to the "add" button and click. If the information is sufficient to add the review, a yellow message box will be displayed, showing that the review number has been added. At this point you move the mouse to the "exit" button and click the mouse once. This will take you back to the Q5 main menu.

If the information is either insufficient or incorrect, you will receive a message box identifying what information is missing or incorrect. Once all corrections are made,

move the mouse to the "add" button and click the mouse once. If the information is correct, you will receive the yellow message box showing that the review number has been added. If at this point, you want to add an additional case(s), move the mouse to the "Clear Button" and click the mouse once. This will provide you with a new blank screen. Follow the previously described procedure to add additional cases as needed.

Once you are finished adding all the reviews, move the mouse to the "exit" button and click the mouse once. You will return to the Q5 Main Menu. You can access the newly added case in the same manner in which all cases are accessed.

APPENDIX A

INSTRUCTIONS FOR INSTALLING Q5 VERSION UPDATE ON SYSTEMS OPERATING IN Windows 95

1. Click on the Start button (in the lower left-hand corner), then select the Run option on the menu.

2. In the Command Line of the Run dialog box type
A:\SETUP

3. Insert disk in the A or B drive.

4. Click on the OK button or press [ENTER].

5. You will see on the screen QCIS VERSION 5 Application Programs with a dialog box with instruction 'Click OK to begin installation....'

6. Click on the OK button or press [ENTER].

7. The computer will begin copying.

8. After copying the first disk, you will see a dialog box that instructs you to Please insert Disk 2.

9. Click on the OK button or press [ENTER].

10. Congratulations dialog box will appear indicating that you have successfully installed this version.

11. Click on the OK button or press [ENTER].

12. After the application program is installed the Q5 icon dialog box is displayed on the screen. Close the dialog box.

13. Double click on the Q5 icon.

14. You will be in the Q5 main menu

15. Choose Pre-Compile from the Utility menu, and follow the instructions on the screen.

APPENDIX B

INSTRUCTIONS FOR INSTALLING Q5 VERSION UPDATE ON SYSTEMS OPERATING IN WINDOWS 3.1.

Note: If installing any QCIS versions takes longer that 15 minutes see instructions for copying to hard disk.

1. Start at the DOS prompt C:\>

2. Type WIN then press [ENTER].

3. Go into the Windows 'Program Manager'.

4. *Select Run from the File Menu. (Press and hold the Alt key then press F, select Run by pressing R from the pull down menu)*

5. *In the Run dialog box type in the Command Line type the following:*
   A:\SETUP

6. *Insert the disk*

7. *Click on the OK button or press [ENTER].*

8. *You will see on the screen QCIS VERSION 5 Application Programs with a dialog box with instruction 'Click OK to begin installation...'*

9. *Click on the OK button or press [ENTER]*

10. *Follow the on screen instructions. When the installation is complete, you will see on the screen that the program was installed successfully.*

11. *Click on the OK button or press [ENTER].*

12. *You will then be back into Program Manager.*

13. *Go into the Q5.*

14. *In the Q5 CDSS main menu screen, choose Pre-compile from the Utility menu.*

15. *You will see a 'Question' dialog box. It will ask 'Pre-compile Routines Now?' Click on the OK button. Pre-compiling will begin.*

APPENDIX C

INSTRUCTIONS FOR COPYING TO HARD DISK

SOME SYSTEMS OPERATING IN WINDOWS 3.1 TAKE LONGER THAT 15 MINUTES TO INSTALL THE Q5 VERSION UPDATES DIRECTLY FROM THE DISKETTE. A SHORT CUT METHOD IS TO COPY THE DISKETTE ONTO THE HARD DRIVE. IF YOUR SYSTEM TAKES LONGER THAN 15 MINUTES TO INSTALL A VERSION FOLLOW THESE INSTRUCTIONS:

1. *Start at the DOS prompt (C:\>)*

2. *Insert disk in A or B drive*

3. *Type MD AP*

4. *Press [ENTER]*

5. *You will get another DOS C prompt*

   Type CD AP

6. *Press [ENTER]*

7. *You will get C: AP>*

8. *Type COPY A:*. * C:\AP*

9. *Press [ENTER]*

10. *You may get the messages 'Overwrite C:\AP\SETUP.EXE (Yes/No/All)?'*
    'Overwrite C:\AP\DISK1BND (Yes/No/All)?
    If you do get this kind of message, Type the letter Y and press [ENTER].

11. *The computer will copy the disk onto the hard drive*

12. *Take out the first disk out of the A or B drive*

13. *Insert the next disk*

14. *Repeat step 7 with subsequent disks. After the last disk is done go to step 15*

Instructions for copying to hard disk, cont'd)

15. *Go to Windows. Type: Win*

16. *Go to the Program Manager menu*

17. *Choose Run from the File menu*

18. *Type the following in the Command Line of the Run dialog box*

    C:\AP\SETUP

19. *Click OK.*

20. *You will See on the Screen QCIS Version 5 Application Programs with a*

dialog box with the instruction 'Click Ok to begin the installation......' Click the OK button. The computer will begin installing the version information of the first disk.

21. *After the installation of the first disk, another dialog box will appear on the screen with the instruction 'Please insert disk 2'.*

22. *Click on the OK button. The computer will begin installing the version information of the second disk.*

23. *'Congratulations! dialog box will appear on the screen. Click on the OK button.*

24. *You will then be back into Program manager.*

25. *Go into Q5.*

26. *In the Q5 CDSS main menu, choose Pre-Compile from the Utility menu.*

27. *You will see a 'Question' dialog box. It will ask 'Pre-compile Routines Now?' Click on the OK button. Pre-compiling will begin.*

GLOSSARY

ICONS: DESCRIPTIONS and FUNCTIONS

ICON	**FUNCTIONS and DESCRIPTION**
LIGHTHOUSE	Takes you to Assigned Cases Screen where Assigned Cases list is provided
FOLDER W/ HAND	Takes you to Facesheet Screen of a specified opened case file
LIGHT PAPER PENCIL	Takes you to Comments screen where you can **AND** write comments that are forwarded with final case

	transmission
DARK PAPER PENCIL	Takes you to comments screen where you can **AND** write comments that will not be forwarded with the final case transmission
4 PAPERS & PENCIL	Allows you to write Class Specific Comments
ROLODEX CARDS	Takes you to Data overview screen where you is provided with entire class and household listing
CALENDAR/ CALCULATOR	Takes you to Data Detail where you is provided with individual class detail
LEFT ARROW	Allows you to Undo data entered in a class
TRASH BASKET	Allows you to Delete entries in an entire class
CHECKMARK	Allows you to Check for Errors on any data entered
3 STACKS OF PAPER WITH/OVER ARROW	Provides you with code list needed for different class line data entry
4 PEOPLE	Provides you with a List of Household members known to the case record

ICON (continued)	**FUNCTIONS and DESCRIPTIONS(continued)**
"D"	Provides you the Handbook of Definitions
"E"	Provides you edit descriptions
OPEN DOOR	Allows you to Exit and return to the Q5/CDSS main logo screen

STATUS CODES and DESCRIPTIONS

CODE	**DESCRIPTION**

BLANK	Sample Download, never opened
A	Active Case
B	Case that has Passed Edits and is ready to be forwarded to your respective CPU
C	Completed Case that CAN NOT BE CHANGED
S	A skeleton case that has been forwarded to yous CPU, but CAN NOT BE CHANGED
Z	Copy of a case that CAN NOT BE CHANGED
W	*Sent to FNS/ACF (CPU Main Only)*
X	*Sent to ACF (CPU Main Only)*
Y	*Sent to FNS (CPU Main Only)*

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